

Document Management FAQs

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OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

How can I take a picture of a patient with smart phone and upload it to patient chart?

You can attach using the OP mobile app. You can use it either to have a photo for their ID, or to attach to a patient encounter. If you are not using the OP mobile app, you can send the picture to a folder on your computer as a jpg, png, or, bmp and then import it into OP using the Docs module.

How can I scan in more pages at one time?

By default, the max page limits set for scanning is 15 for monochrome documents, 2 for grayscale, and 1 for color. To scan more pages at one time without receiving an error stating "Page Limit Exceeded", you can increase your **scanning page limit** in the Basic tab of Global Preferences. Because this setting is made at the global level, it must be changed by a user with Administrative permissions.

How do I view existing patient documents?

To view existing patient documents, follow the steps below:

1. Click on the **Docs** button.
2. Use the Patient Finder to search for the patient.
3. OP 14 displays patient documents in the Document List panel on the left side of the window.

How do I print patient documents?

To pull up a patient document, follow the steps below:

1. Click the **Docs** button.
2. Use the Patient Finder to search for the patient.
3. From the Document List panel on the left, select the document you want to print.

Then select one of the following ways to print the document:

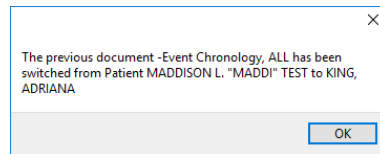
1. Click the **Print Selected Record** button to print the selected scanned document.
2. Click the **Print Image** button if you need to print the selected record with info.

How do I move a document to another patient?

The method for moving a Document from one patient to another depends on whether or not the Document was shared to the IntelliChart Portal. Moving and deleting Documents is recorded in the Audit Trail.

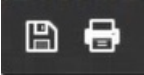
To move a scanned document that **has not been shared to the Patient Portal (InteliChart) to another patient:**

1. Navigate to and select the document in the patient's chart that has to be moved to another patient.
2. Click the **Edit** button located in the toolbar.
3. Click in the **Patient ID** field to search for and select the patient to which the document should be moved.
4. Click the **Save** button.
5. Click the **OK** button to confirm that it is OK to drop existing attachments from the current patient.
6. In the Audit Trail window, select or enter a reason for the change.
7. Click **OK** in the confirmation window.



To move a scanned document that **has been shared to the Patient Portal (InteliChart):**

Warning: This workflow involves the deletion of the Document. It is recommended to make sure you have either the original Document or a saved copy that you can import into the correct patient's chart before deleting it. Use the **Save a Copy** or **Print** button displayed when hovering over the Document to ensure you have a copy of the original.



1. Navigate to and select the document in the patient's chart that has to be moved to another patient.
2. Click the **Delete** button.
3. Click **YES** to confirm you want to proceed by deleting the Document.
4. In the Audit Trail window, select or enter a reason for the deletion.
5. Click in the **Patient ID** field to search for and select the patient to which the document should be moved.
6. Click the **Save** button.
7. Click the **OK** button to confirm that it is OK to drop existing attachments from the current patient.

How do I attach document through message?

To attach a document to a message, follow the steps below.

From Document Management

1. Navigate to Document Management: **Practice Management > Document Management**.
2. Use the **Patient Finder** to search for the patient.
3. From the Document List panel on the left, select the document you want to send.
4. Click the **Send** button.
5. A new message opens. The attached document will be located under **Attachments**. Complete the message as usual.

From a Message

1. **Create a message**.
2. Click on the **Attach document(s)** button.
3. This will open the Search for Documents window. **Select** the document. To add more than one document, press the **Ctrl**

- button on your keyboard and click on additional documents.
4. Click the **Use Selected Document(s)** button.
 5. The attached document(s) will be located under **Attachments**. Complete the message as usual.

How do I add a page to a scanned item?

To add a page or multiple pages to a document that has already been scanned into OP, follow the steps below:

1. Click the **Document Mgmt** button.
2. Search for the patient. The documents that are associated with the patient will appear.
3. Select the document in the Document List panel.
4. Click the **Edit** button.
5. Prepare the document for scanning, and select the **Scanner** button to initiate the scan. An image of the scanned document will appear.
6. Select the newly scanned document from the Sketch Panel. Drag and drop it into the blank area of the Thumbnail panel, which contains the original scanned document of the same item type. The page(s) will be added to the end of the original document in the Thumbnail panel.



Note: To reorder pages, use the blue up and down arrows located at the bottom of the screen in the Editing Controls area.

7. Click the **Save** button.

How do I add a document to an external device (USB thumb drive, external hard drive, etc.) ?

Overview



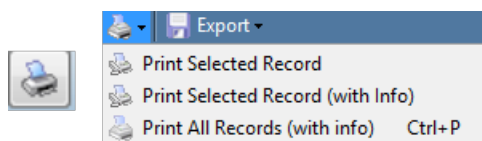
Note: Before saving a document to any external device, be certain it is connected to your computer. Also, please follow any HIPAA regulations accordingly before transferring any documents to an external device.

Any printable items within OP can be sent as file to an external device that is connected to your workstation. Please set your **output options** to Preview or Print prior to sending the document to the connected external device.

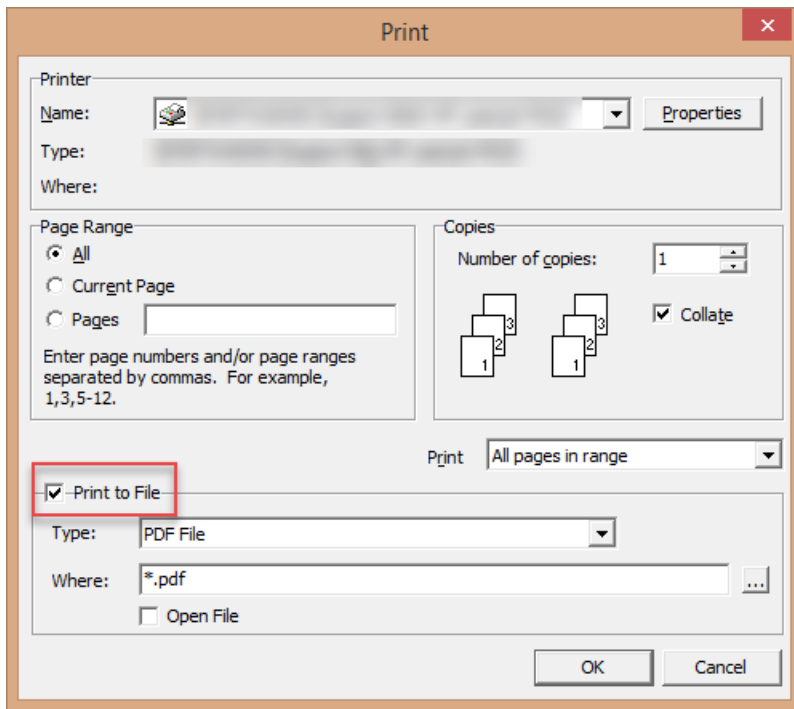
Sending a Document to an External Device using the Print Button

There are multiple ways to send a document to an external device. One way is to use the **Print** button. To send a document (like a PDF) to a connected device (USB drive, etc.), perform the following steps:

1. Open the document or window that you wish to print. Any window with a printer icon will allow some or all of the information in that window to be printed.
2. Select the printer icon in the active window. If you are in the Manage Documents window, select one of the options that appear in the dropdown when the Printer button is selected (Print Selected Record, Print Selected Record (with info), Print All Records (with info)). The Print window appears.



3. In the Print window, select the **Print to File** checkbox.



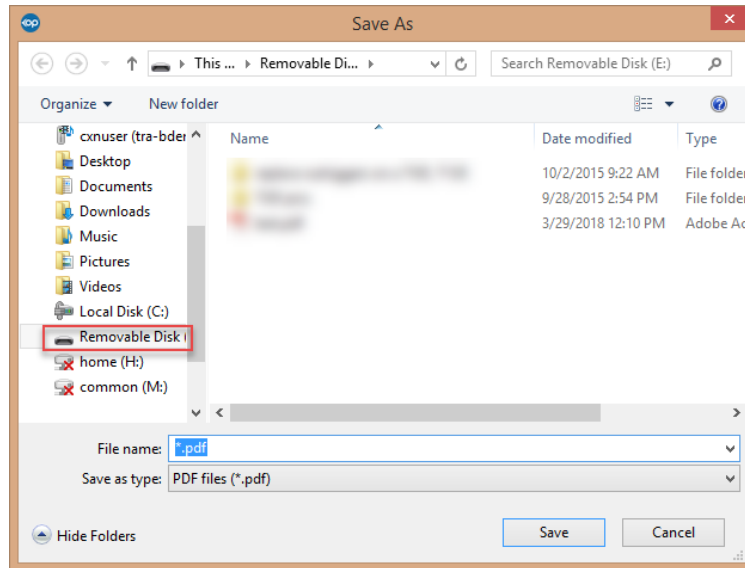
4. Select the file type to be printed in the Type dropdown (PDF, Bitmap, JPEG, GIF, etc.).



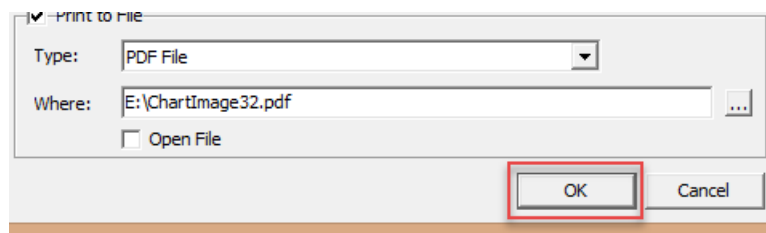
5. Click the Save As Location (..) button next to the Where field.



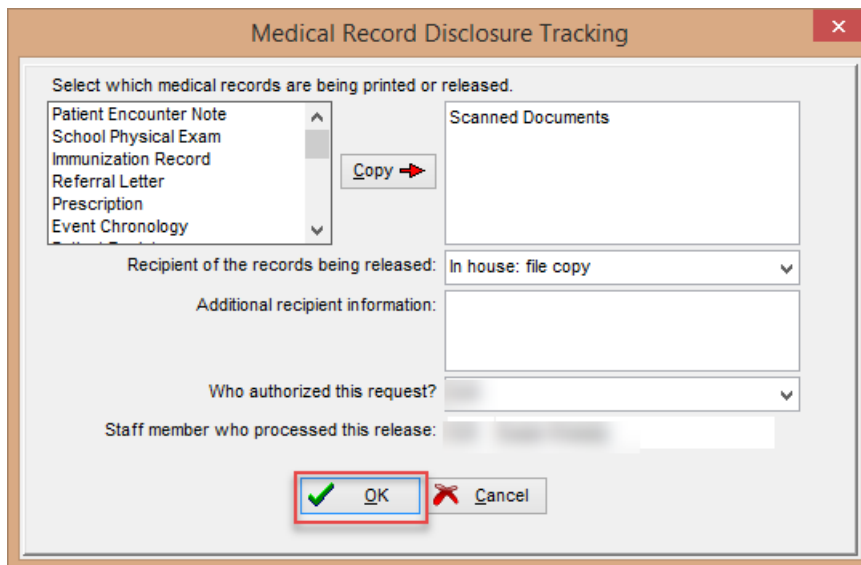
6. Select the Removable Disk/Device location.



7. Enter the document name in the File Name field.
8. Click the **Save** button. The path where the file will be saved will appear in the Where field.
9. Click the **OK** button. The Medical Disclosure Tracking window will appear.



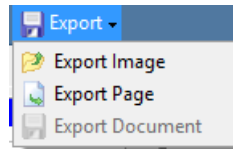
10. Click the **OK** button. The file will be saved onto the external device.



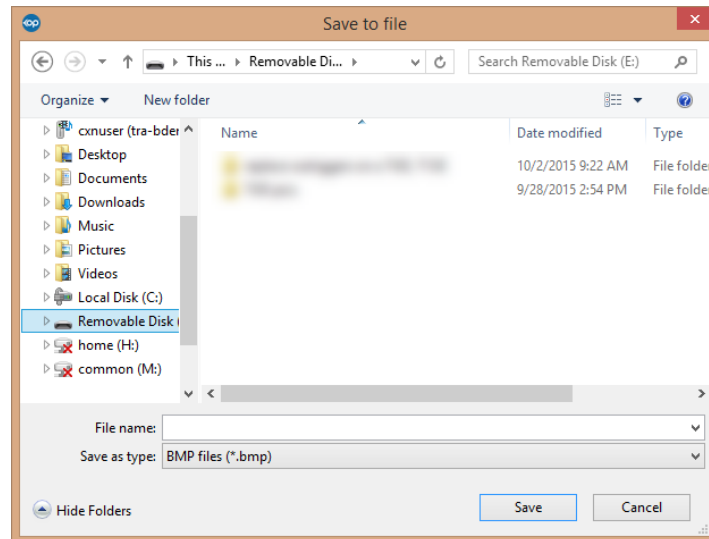
Export as an Image or Page from the Manage Documents Window

There are multiple ways to send a document to an external device. One way is to Export a document from the Manage Documents window by clicking the Export button. To export a document to an connected device (USB drive, etc.) as an image, perform the following steps:

1. Click the **Docs** button.
2. Locate and select the image you wish to export.
3. Select the Export dropdown and choose either Export Image or Export Page. The Save to File window appears.



4. Select the Removable Disk/Device location.

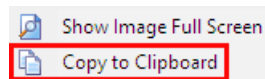


5. Enter the name of the file into the File Name field.
6. Select the file type in the Save as Type dropdown.
7. Click the **Save** button. The image will be saved to the removable external device.

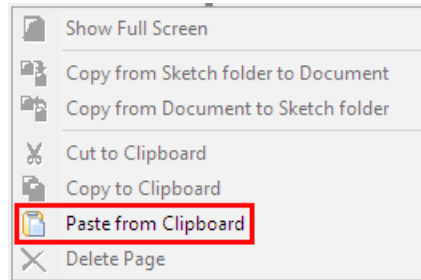
How do I copy a scanned item to another patient?

To copy a scanned document to another patient, follow the steps below:

1. Click the **Document Management** button in the Clinical and Practice Management tab.
2. Use the Patient Finder to search for the patient who has the document attached to the chart.
3. From the Document List pane on the left, select the document to be copied.
4. Right-click on the image in the Preview Panel.
5. Select **Copy to Clipboard**.



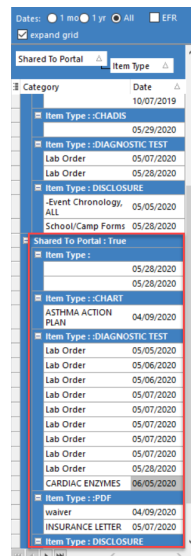
6. Use the Patient Finder to search for and select the patient chart where you will paste the document.
7. Click the **New Document** button.
8. Right-click in the Sketch Panel and select **Paste from Clipboard**.



9. Drag the item over to the Preview Panel.
10. Complete the Document Details.
11. Click **Save**.

How do I label and share a scanned document to the Patient Portal?

The Item Type and Item Category selected should be appropriate to the document that is scanned. In order to share a scanned document to the IntelliChart Patient Portal, the **Shared To Portal** checkbox must be selected and the Privacy Level must be set to **Any Staff Member**. The expiration date may be left blank or a date can be entered. If the practice has set the number of default days, in the Portal tab of System Preference, once saved the date will populate. When **saved**, the document is displayed in the **Shared to Portal : True** group but is still associated to the selected Item type and category.



Attention: For clients that used the former portal, saving documents to the Forms Item type is no longer required to send a document to the IntelliChart Patient Portal.